



The Virtualization of the Client and the
Disruption That Ensues

Jay Yang

Senior Research Manager, IDC TW

Ultra
Mobility

Agenda

- Client Evolution
- Current Problems
- New Solutions
- The Impact
- Essential Guidance

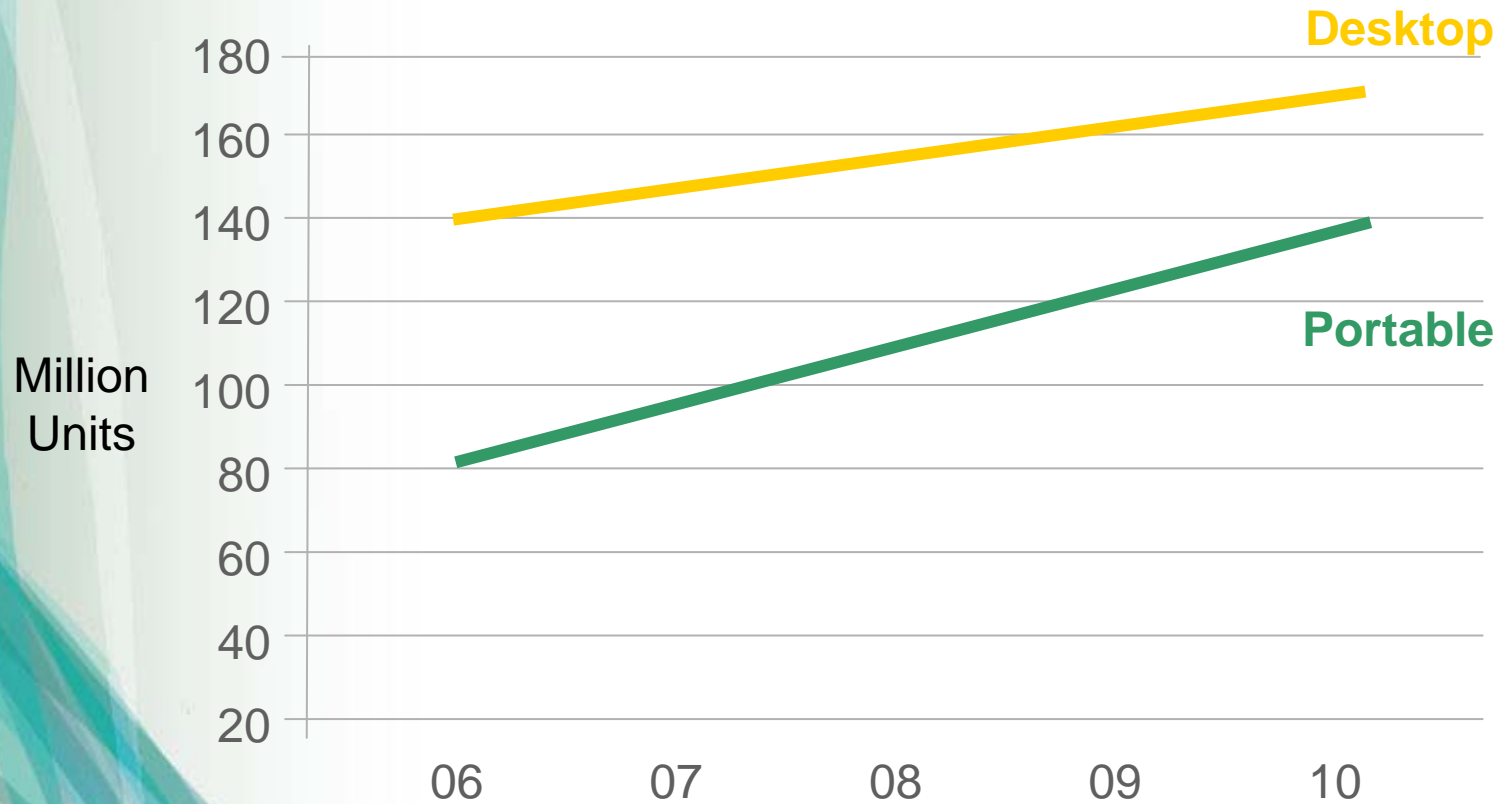
Client Evolution

Computing devices are evolving



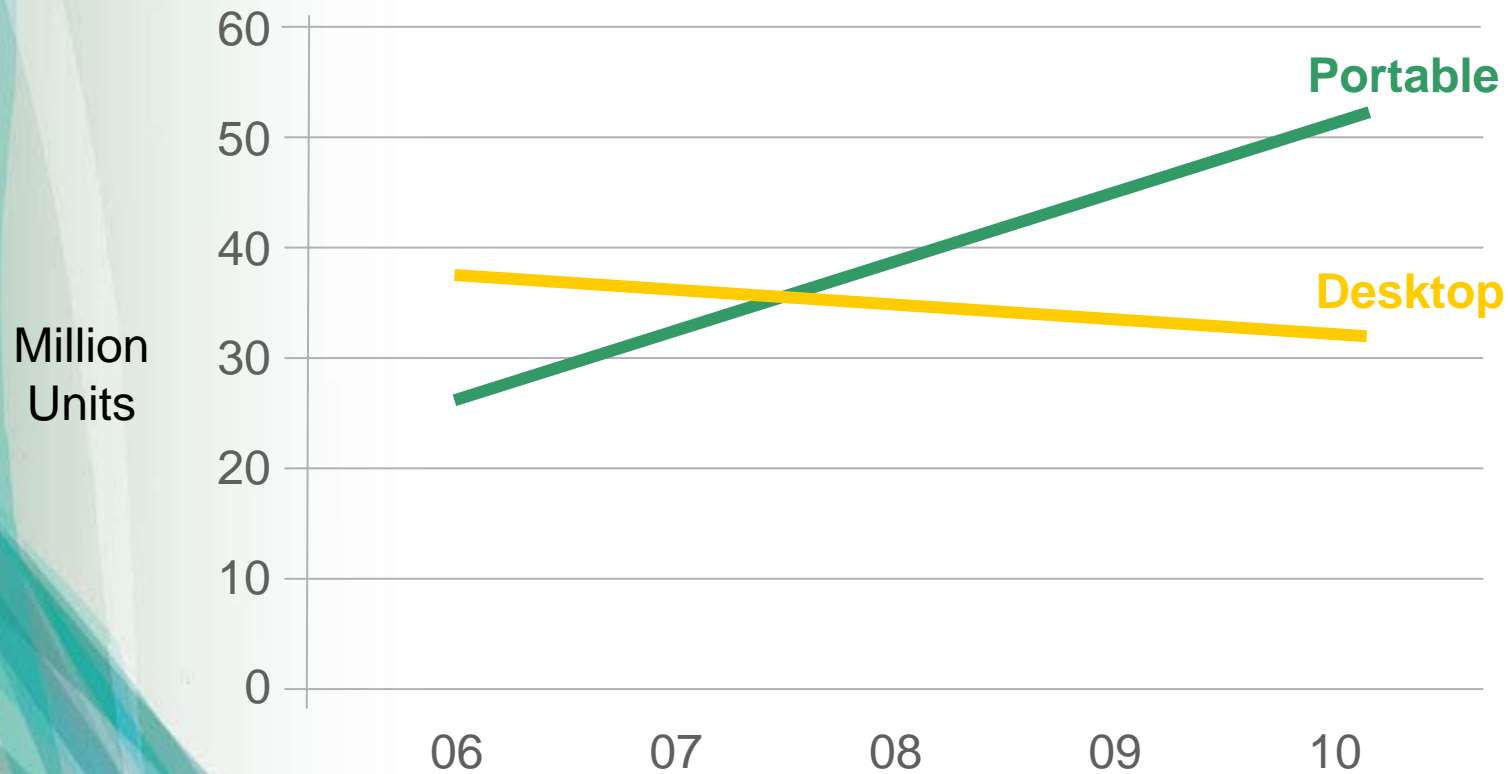
Client Form Factor Forecast

Worldwide

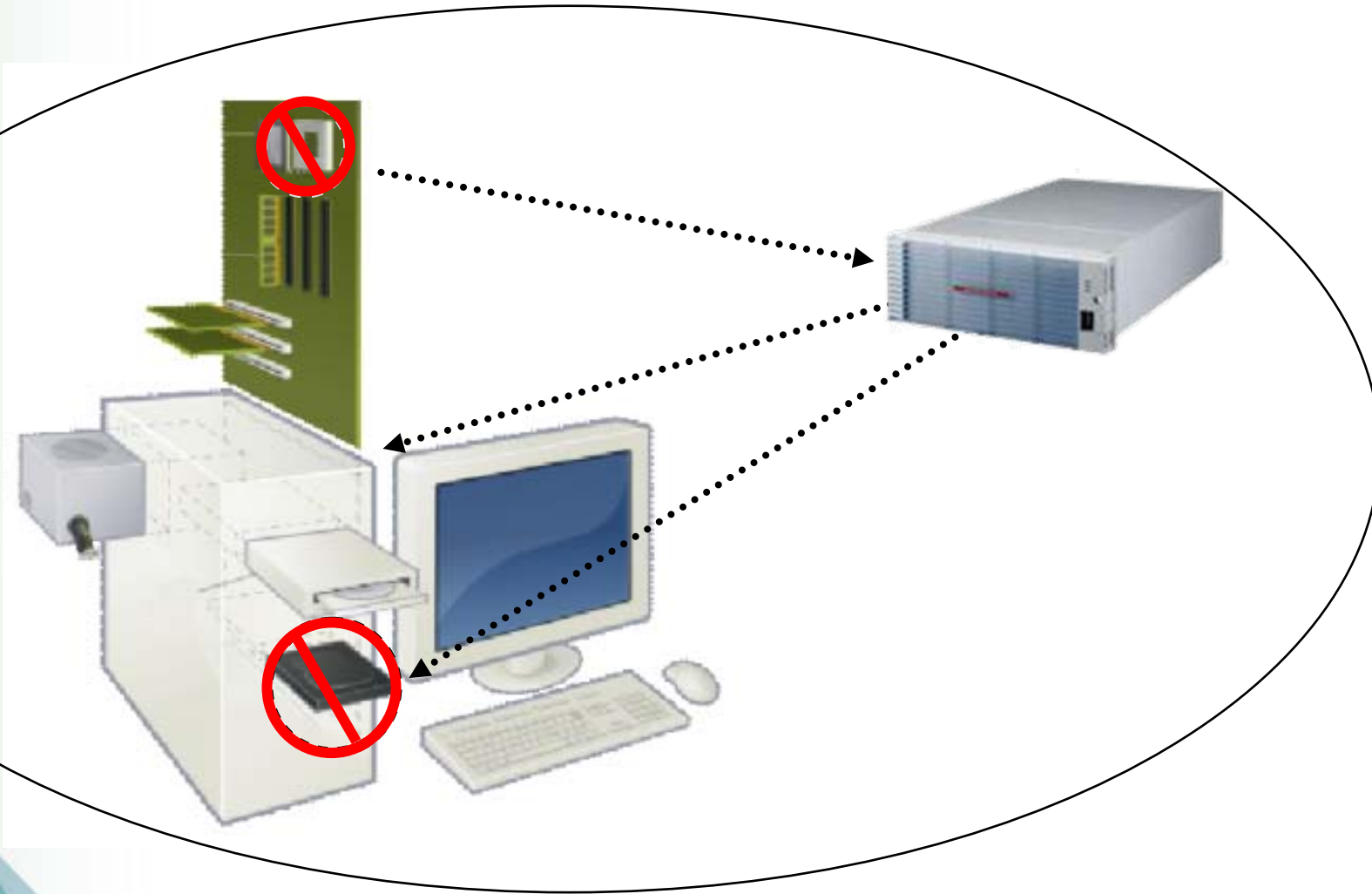


Client Form Factor Forecast

United States



The Computing Epicenter Is Evolving



Environments Are Changing

- Technology
 - More processing occurring at server
 - Networks more robust
 - Software managed, delivered from server
- People
 - Individuals want multiple client access to data
- Clients
 - Computing embedded in many more devices
 - Portable digital identities now possible

Current Problems

- Security
 - Data loss
 - Compliance
- Support costs
 - Can surpass \$1,000 per PC/year
 - Even tightly-managed PCs expensive

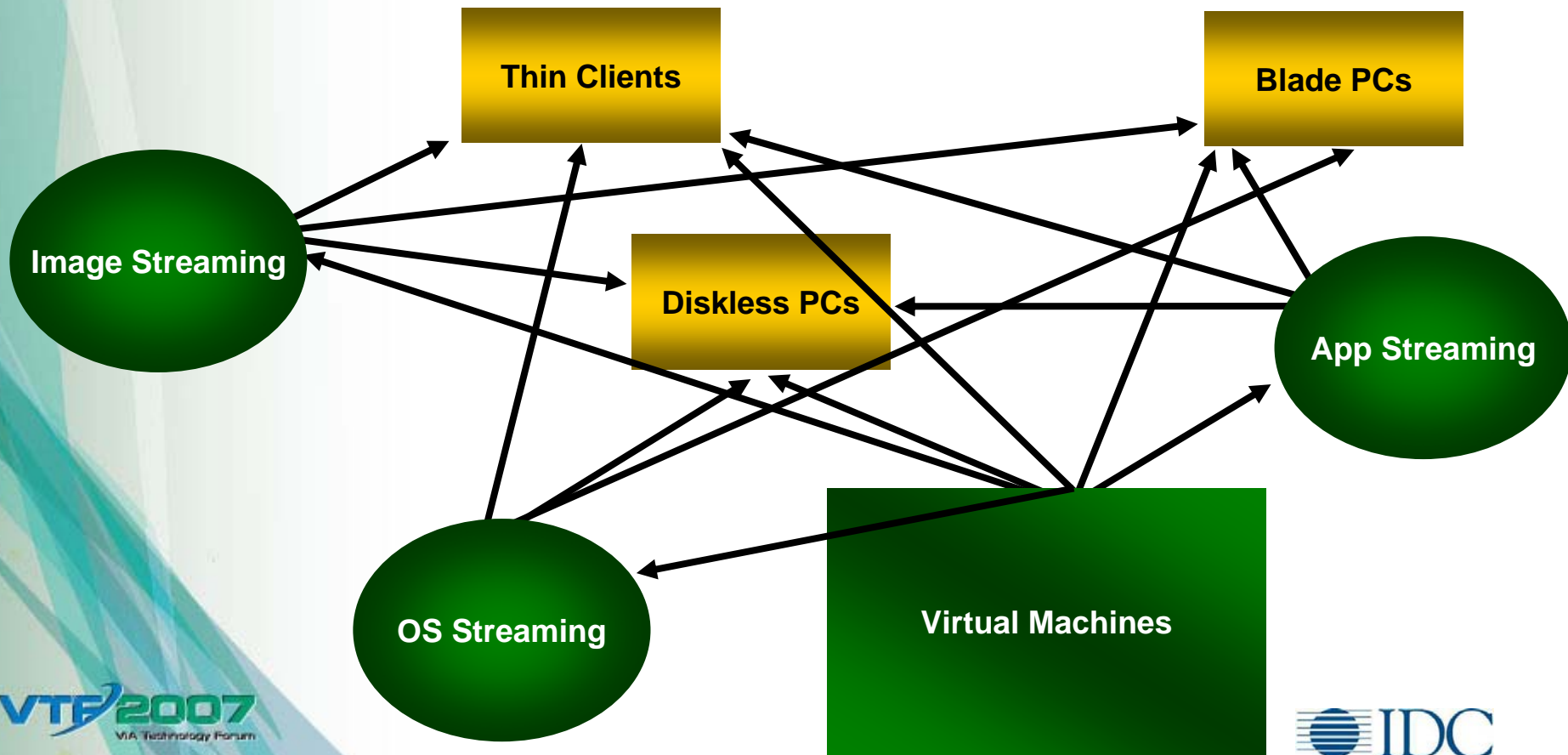


Ideal Solution

- Maintain security of server-based solution
- Maintain performance of desktop solution
- Maintain application, peripheral compatibility of desktop
- Minimize network impact
- Allow easy transition from existing IT infrastructures
- Reduce costs

New Solutions

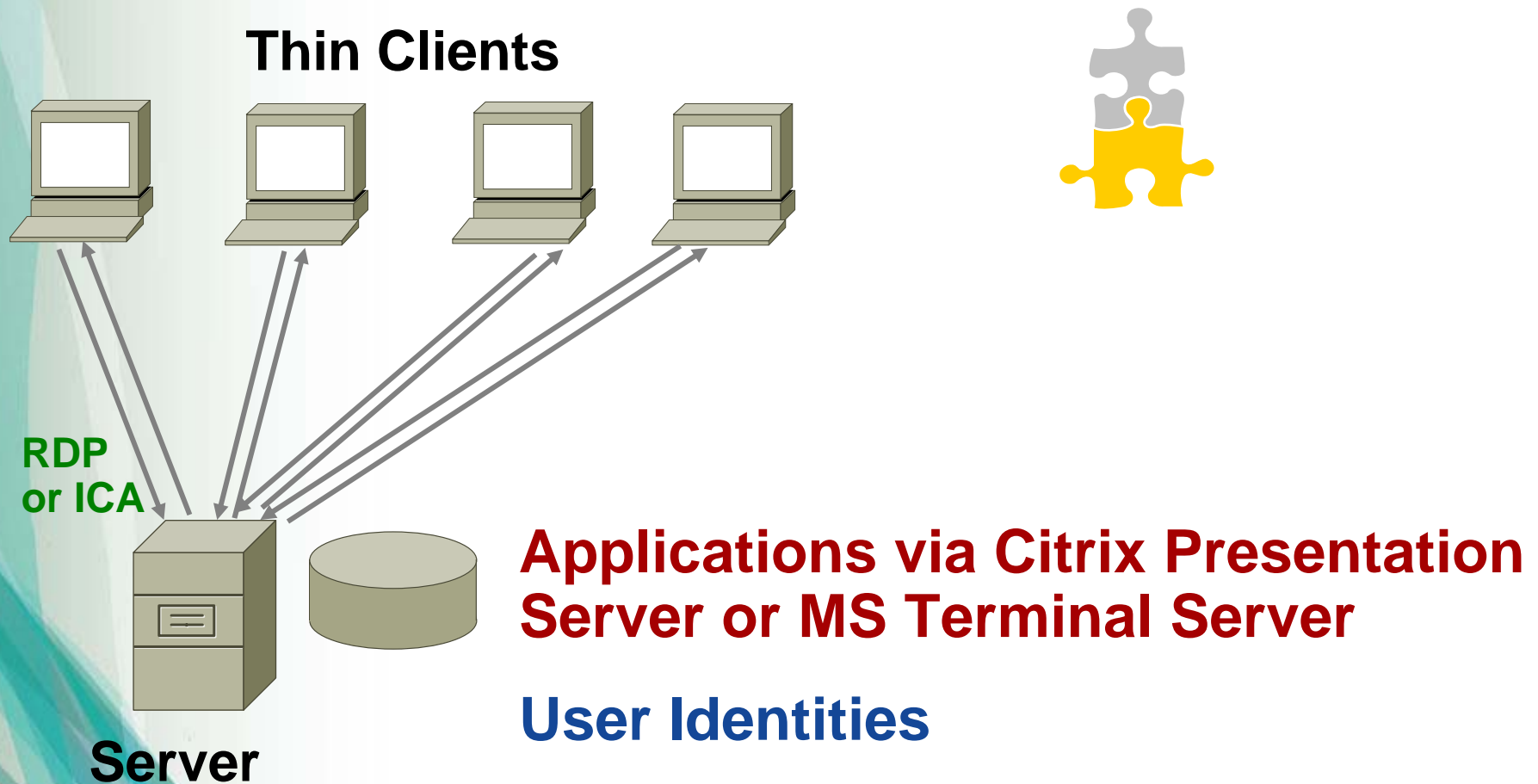
Server-based Computing Solutions



IDC's Virtual Client Definition

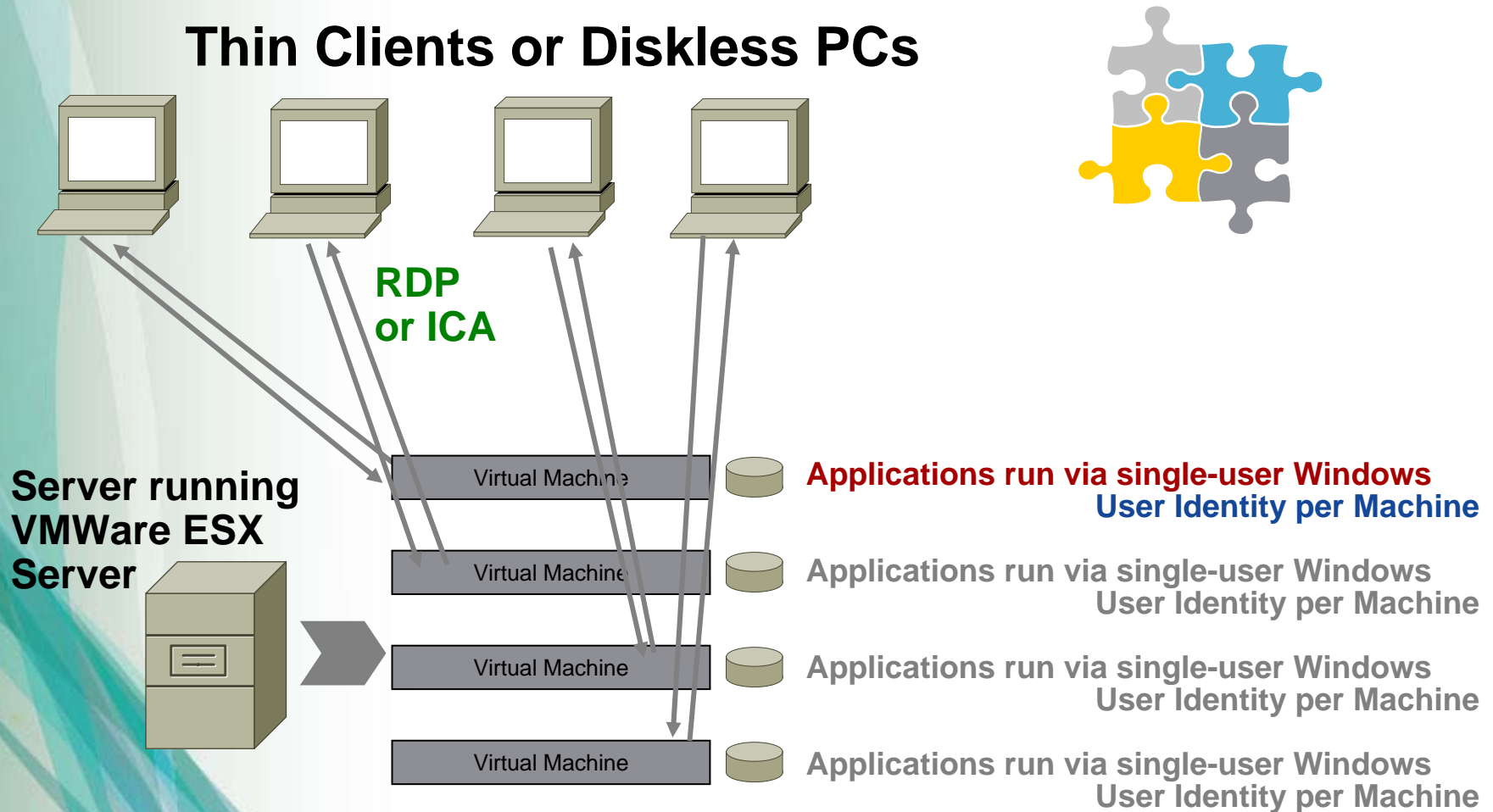
*"A collection of devices and software
that enable the simulation of a
traditional PC experience
through the use of a
centralized computing architecture"*

Traditional Server-Based Computing



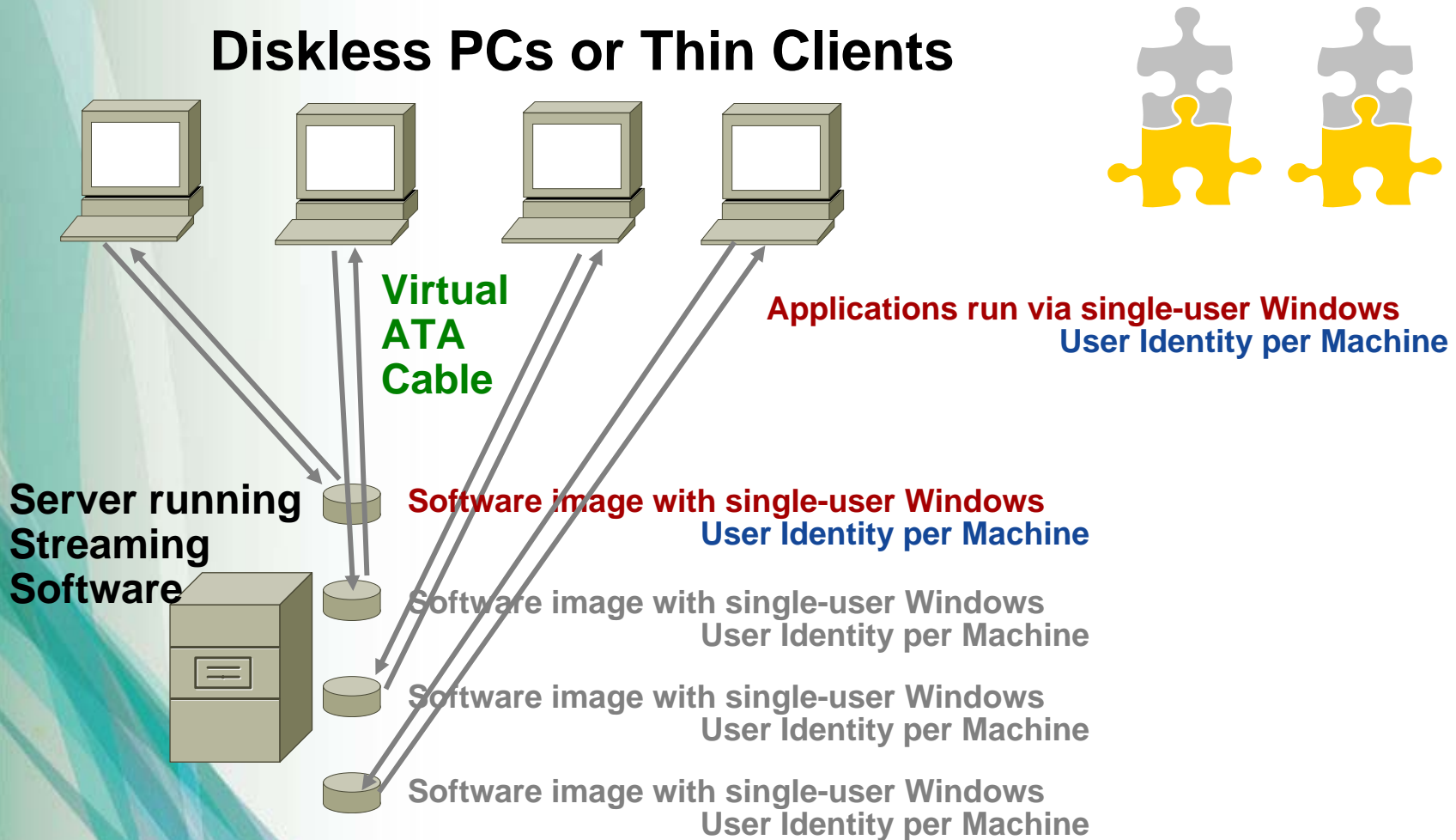
Virtual Client Computing Model #2

Thin Clients or Diskless PCs



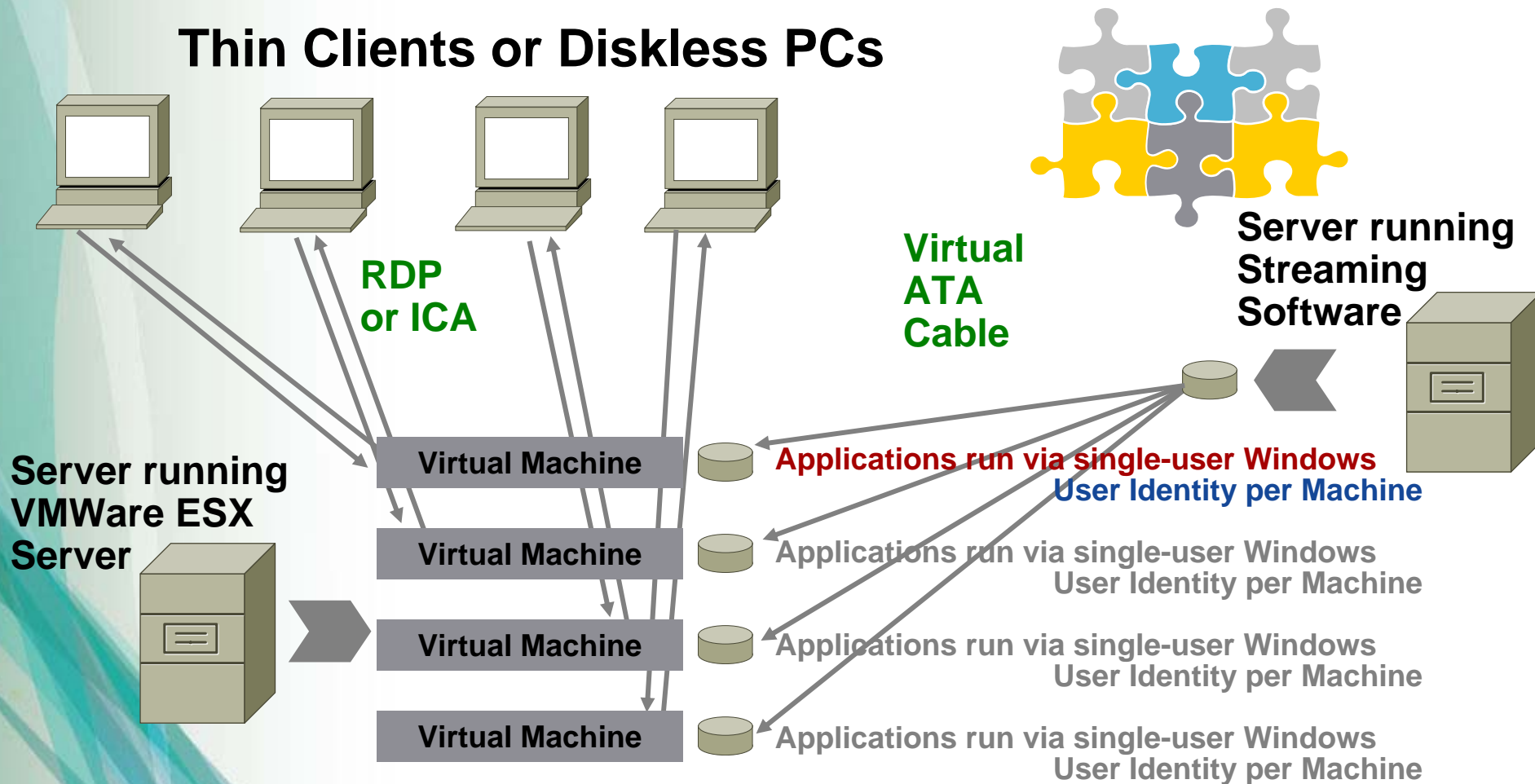
Virtual Client Computing Model #2

Diskless PCs or Thin Clients

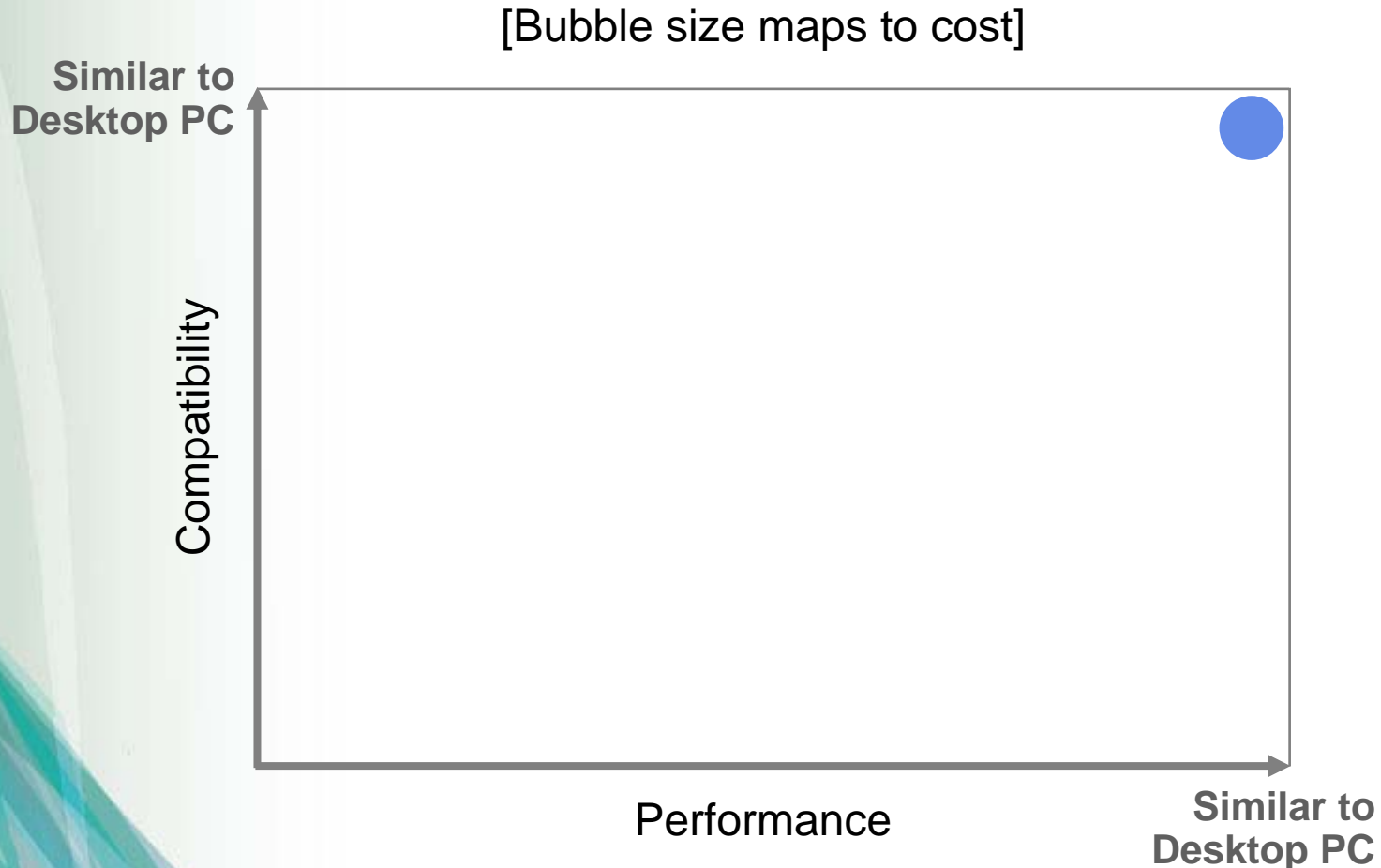


Virtual Client Computing Model #3

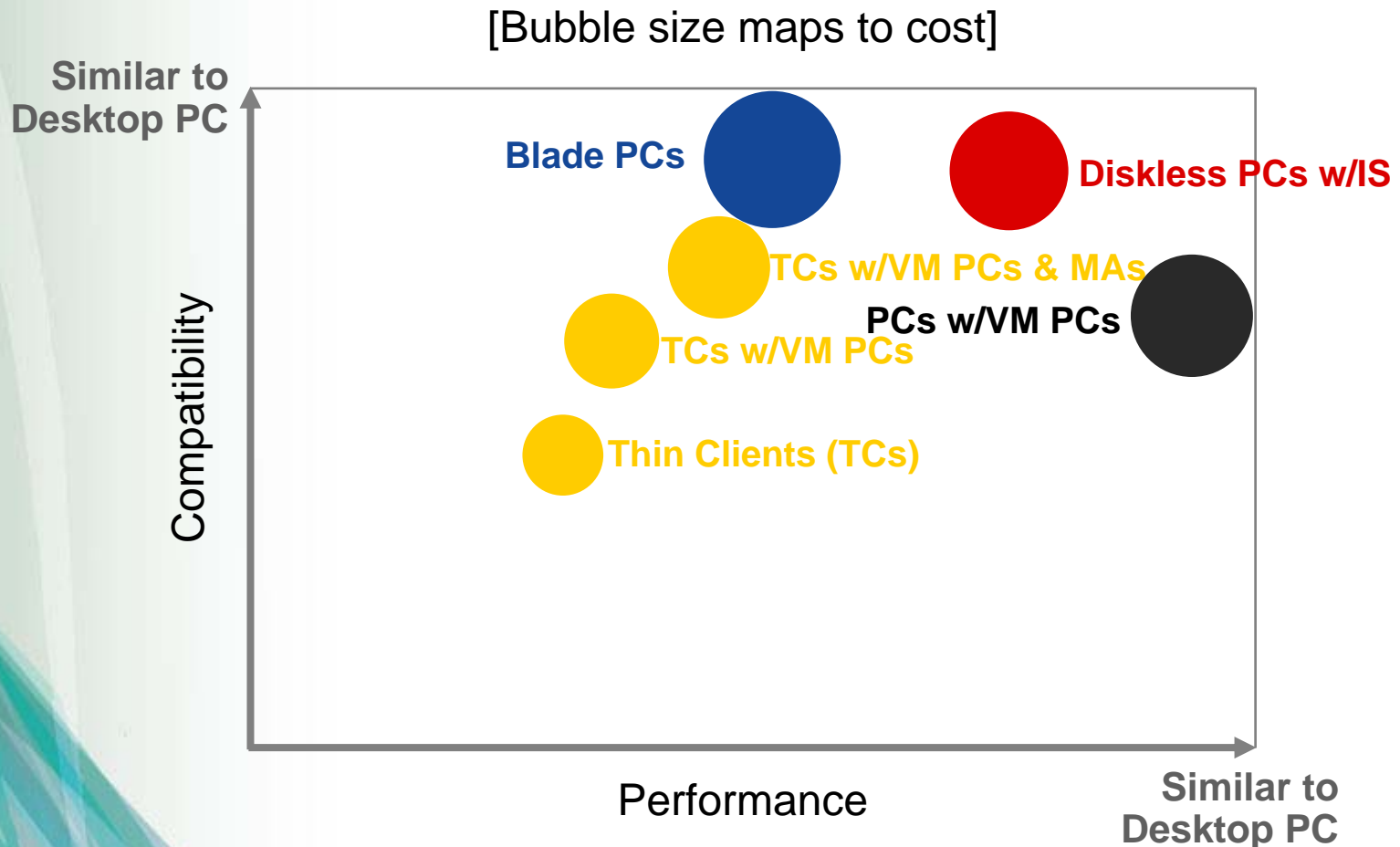
Thin Clients or Diskless PCs



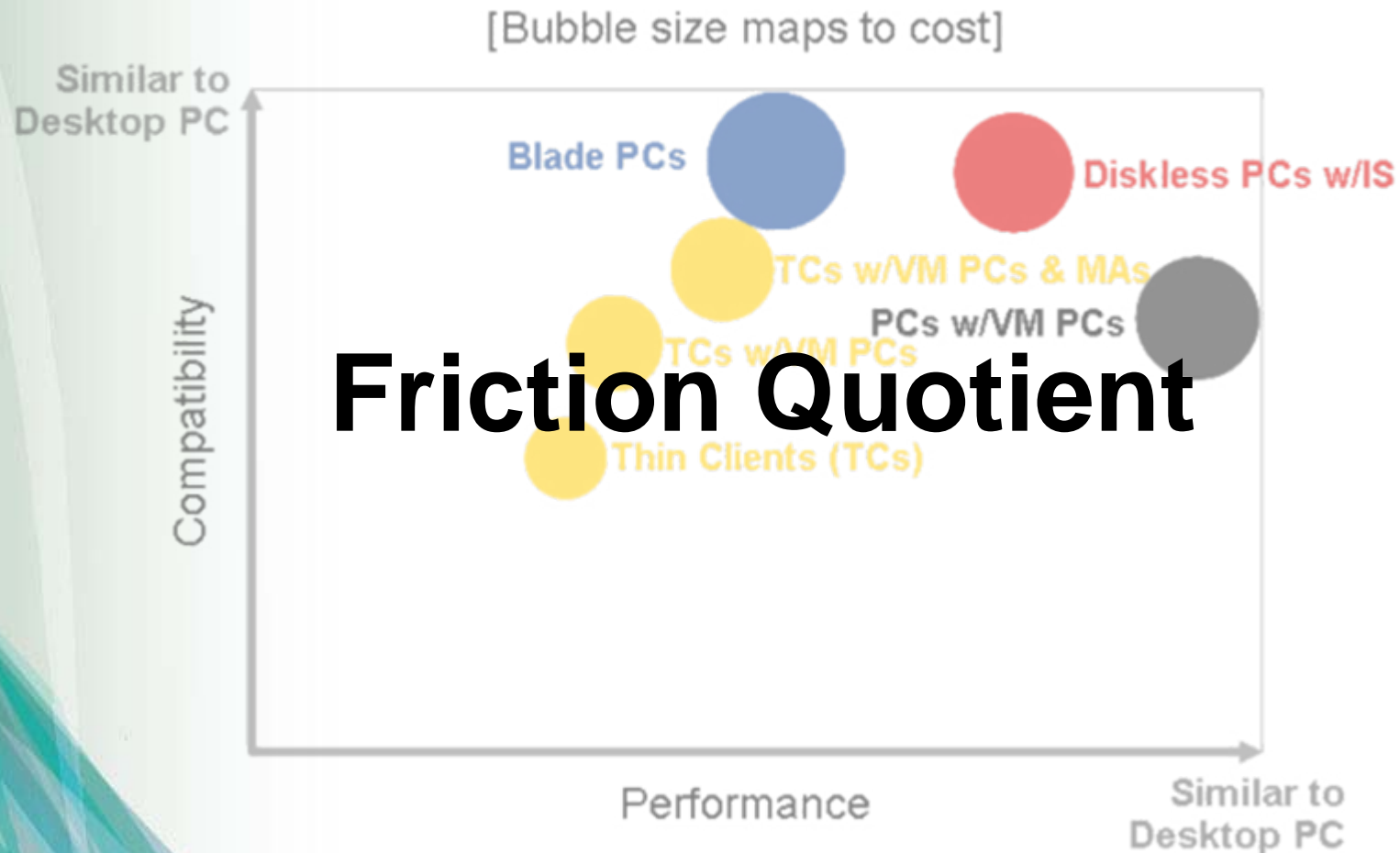
Mapping New Solutions to Ideal



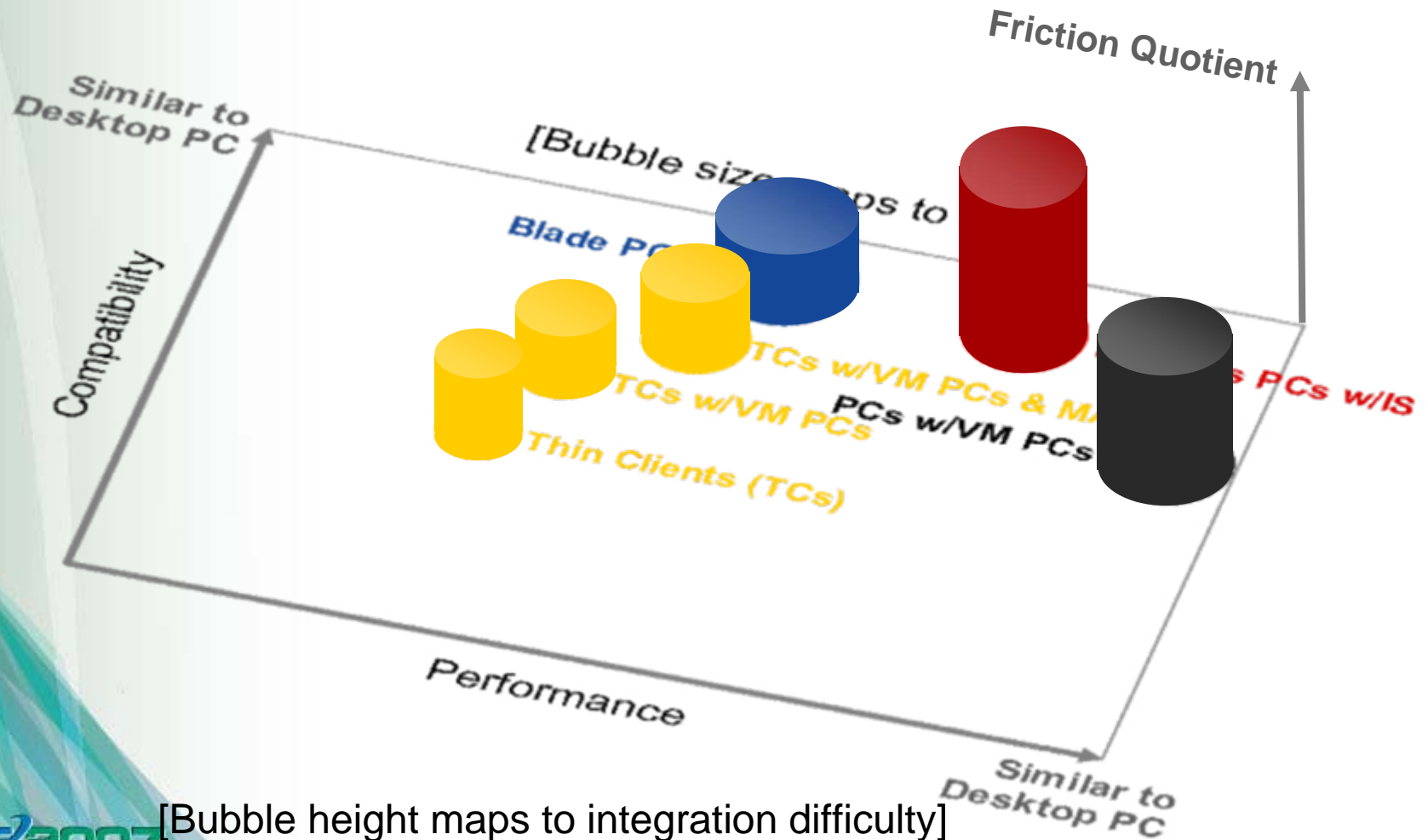
Mapping New Solutions to Ideal



Mapping New Solutions to Ideal



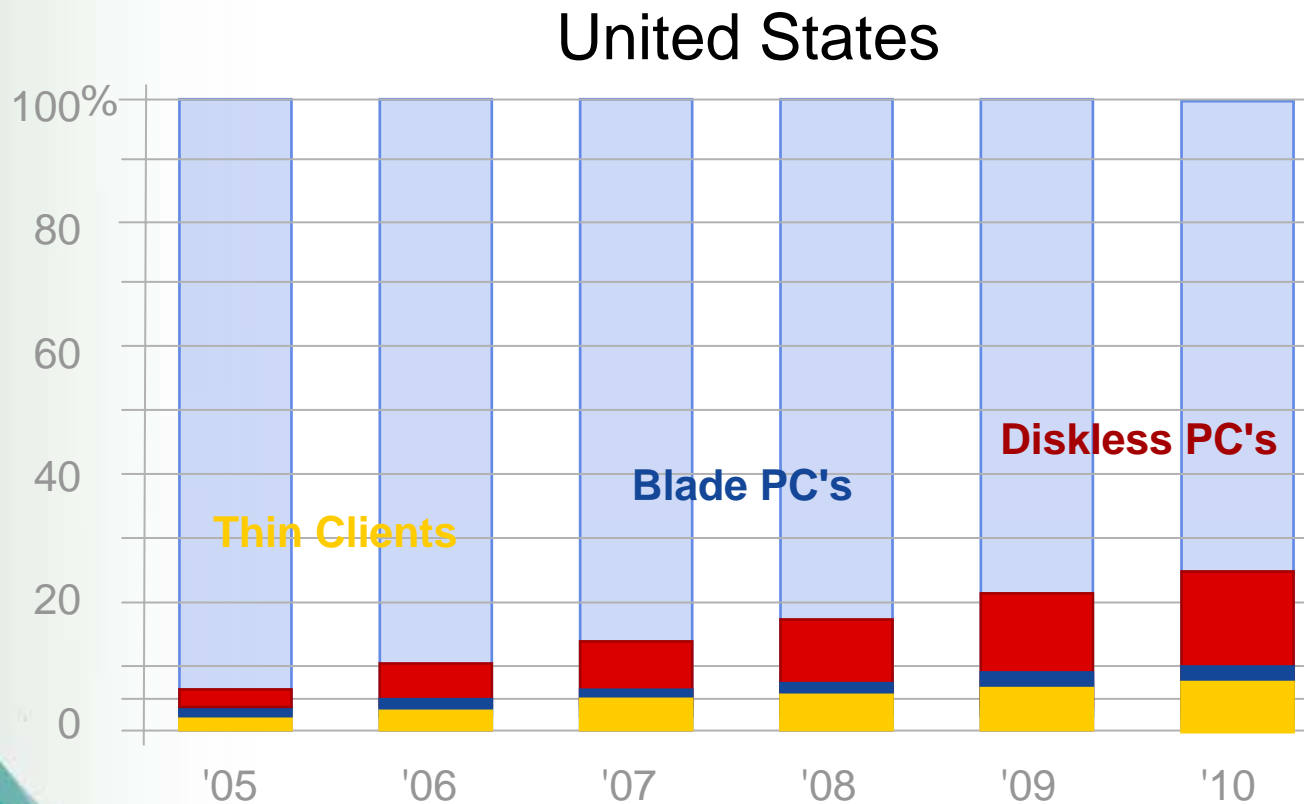
Mapping New Solutions to Ideal



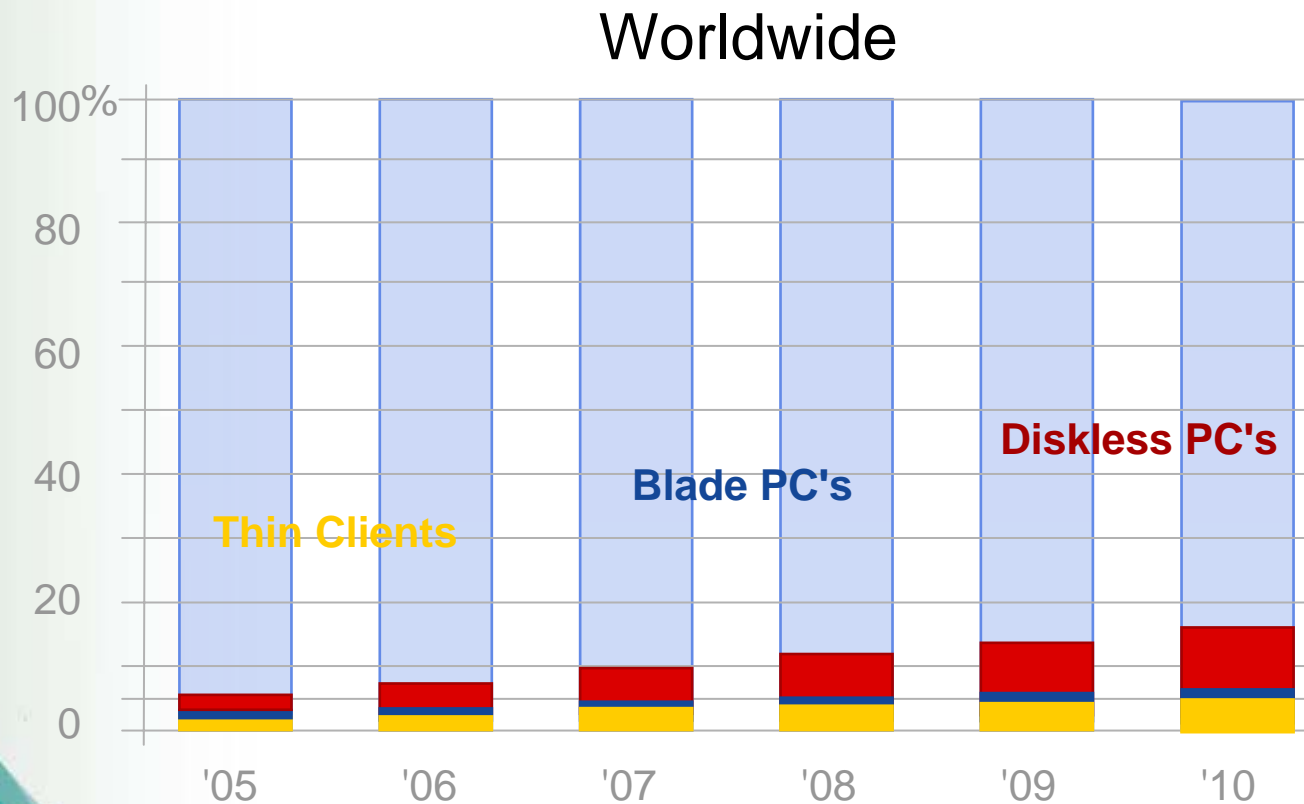
The Impact

- From a technology perspective
 - Traditional partially-managed desktop PCs at risk
 - Better, cheaper, safer solutions
- From a practical perspective
 - Overcoming inertia difficult
 - Internal ownership
 - Training & support

Forecast of New Client Solutions



Forecast of New Client Solutions



Challenges

- More philosophical than technical
 - The “friction” quotient
- Complicated architectures
- Licensing issues with Microsoft
- Initial costs
 - Transition from existing environments
- Mobile solutions

Essential Guidance

- Hardware, software vendors need products that fit
- Sales cycles will be long
- One approach will not fit all needs
- Customers need solutions
 - Including transition plans
- Impact on datacenter & IT departments enormous



- Please email me at jayyang@idc.com